Co-op agent recruiting script after a completed transaction

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A completed co-op transaction can give you a real basis for an introduction. Refer to work you actually observed, then state plainly if you want to discuss a recruiting opportunity. Keep the recruiting conversation separate from any unfinished responsibilities to the clients.

This is an illustrative example for a team leader or brokerage owner using an approved contact process. Confirm the transaction, the agent's role and the opportunity before adapting it. Do not describe a colleague's experience as your own.

Use a specific, truthful opening

> “Hi [name], this is [your name] with [company]. We worked together on [completed transaction you can appropriately reference]. I appreciated [specific conduct you personally observed]. I’m also involved in recruiting for [team or office], and I wanted to ask whether you'd be open to a separate conversation about [actual opportunity].”

If another agent on your team handled the transaction, identify that connection accurately and use only information you are authorized to share. Avoid client circumstances, negotiation details or private financial information.

An agent's professional handling of one transaction is a reason to talk, not proof that they want to change companies.

Explore the fit before listing benefits

> “What would you want to understand before considering a different arrangement? Is there anything you want more support with in your business?”

Connect the answer to something your team or brokerage can actually deliver. Explain the people, availability, costs and agent responsibilities behind that support. A software list alone does not explain how the work gets done.

> “You mentioned [stated need]. We handle that through [verified process and responsible person]. I can show you how it works and the terms that apply, if it sounds relevant.”

If you discuss lead generation, use the lead-offering conversation to prepare the details. Do not promise a number of additional transactions or suggest that a quick start is typical without appropriate evidence.

Keep the professional relationship intact

If the agent is interested, agree on a meeting purpose and a time. If they decline, thank them. The quality of your future co-op work should not depend on their willingness to consider joining you.

> “Understood. Thank you for considering it. I appreciated working with you on the transaction.”

After an accepted invitation, record the questions raised and who will answer them. Do not put the agent into an ongoing recruiting sequence merely because you shared a transaction.

For help connecting your recruiting conversations to the business you want to build, Talk through your next move.

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